

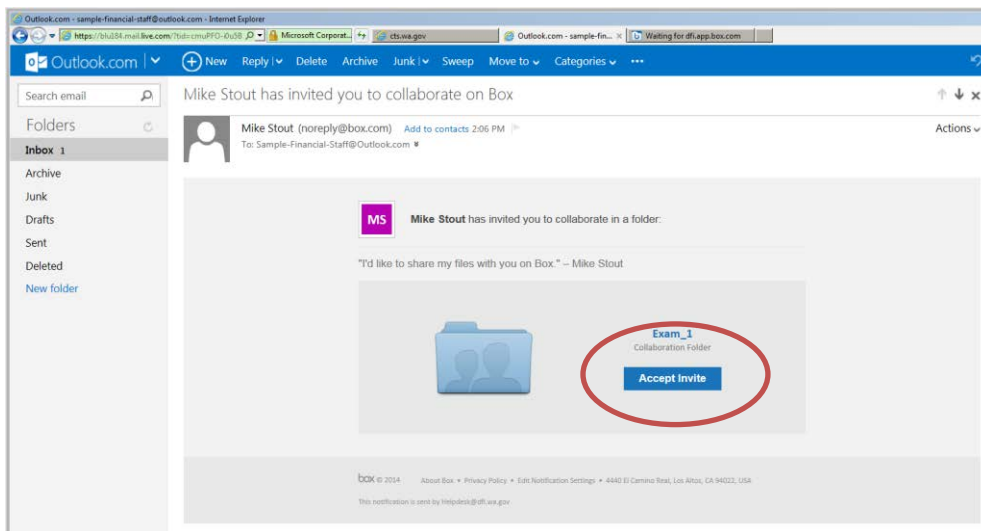
Transferring Files to DFI using Box.com

Summary:

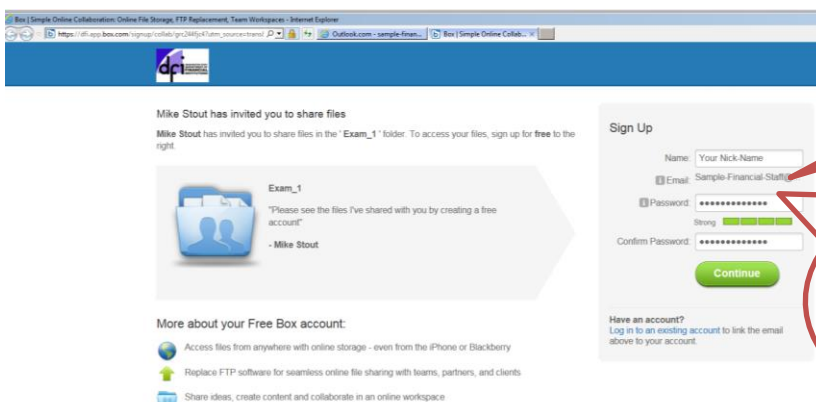
1. Create a Box.com Account if you don't already have one.
2. Access the DFI Secure Folder
3. Zip and Encrypt the file(s) using WinZip.
4. Upload your zipped and encrypted file to the DFI Folder.
5. Share the WinZip password to your DFI representative.

1. Create a Box.com Account:

Your financial institution's representative receives an email invitation to a folder from DFI's Box account. He or she must click the Accept Invite button. It's circled in the diagram below. In this example, the e-mail address of the of the financial institution's representative is Sample-Financial-Staff@Outlook.com.



When you click "Accept Invite" a web browser opens the Box.com Sign Up page. Your Box username will be your email address. In the Name field, enter a name or nickname you'd like to use for your Box account, a complex password and then click "Continue". A complex password contains at least 8 characters, and includes a special character, a number, and uppercase and/or lowercase letters.

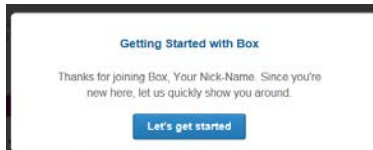


Your Username is your Email address

Complex Password Contains at least 8 Characters, including:

- At least one Number
- At least one Special Character
- Upper and / or Lowercase Letters

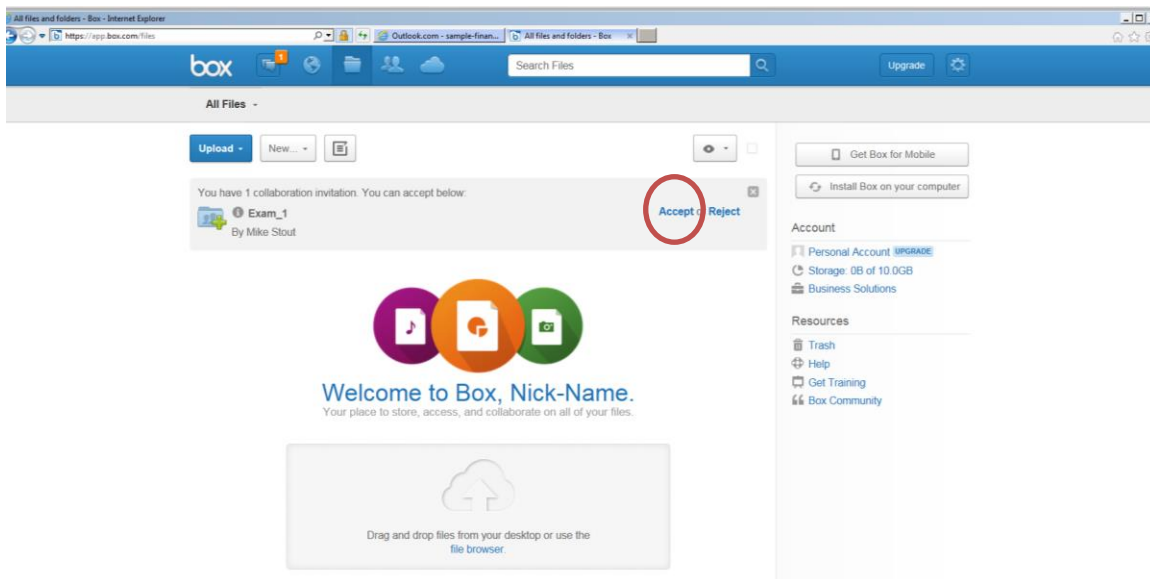
A brief tutorial is available after creating an account. You can bypass the tutorial by pressing ESC.



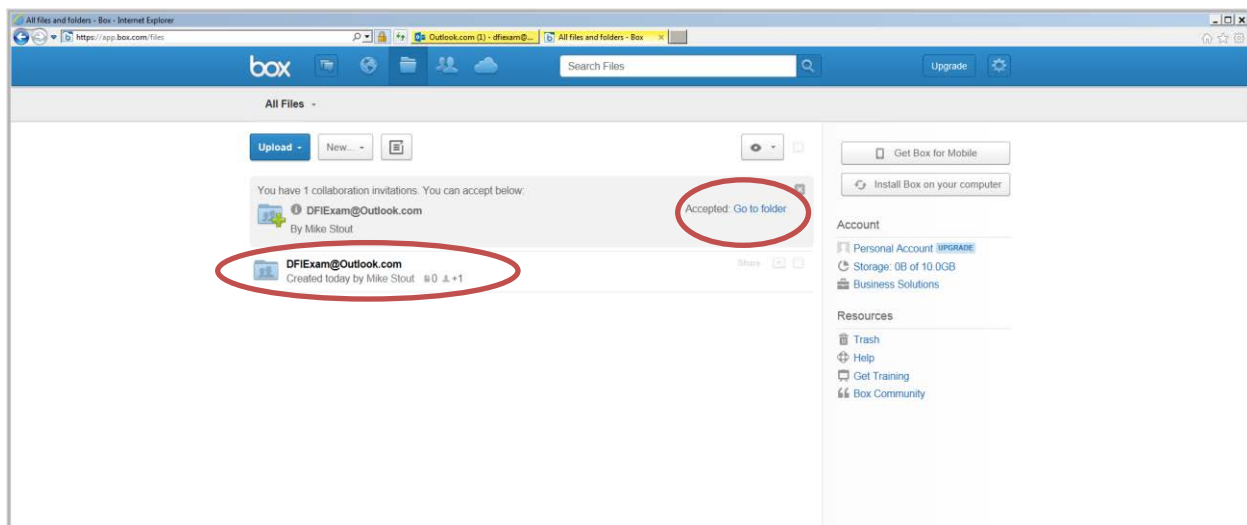
You now have a free personal storage account.

2. Access the DFI Secure Folder:

In order to access DFI's Secure Folder, first click "Accept" (circled below) in the collaboration invitation box.

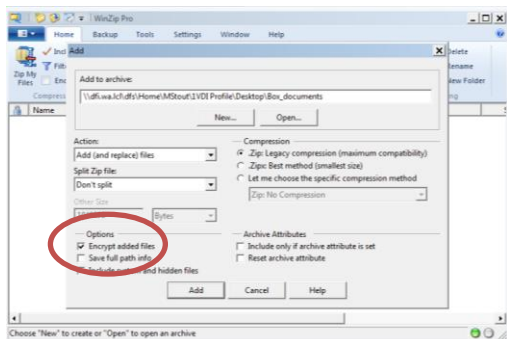


Then to enter the secure DFI folder, click "Go to folder", or click the blue folder icon.

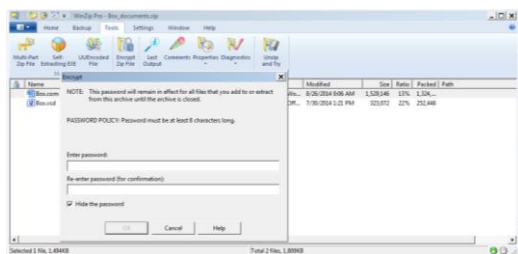


3. Zip and encrypt your files:

Zip and encrypt your files using WinZip before uploading files to DFI.Box.com. To encrypt your files, check the encryption box circled below in the WinZip dialog box.



Please create a complex password to complete the encryption process. You'll share the password with your DFI representative. The attributes of a complex password are listed in Step 1.

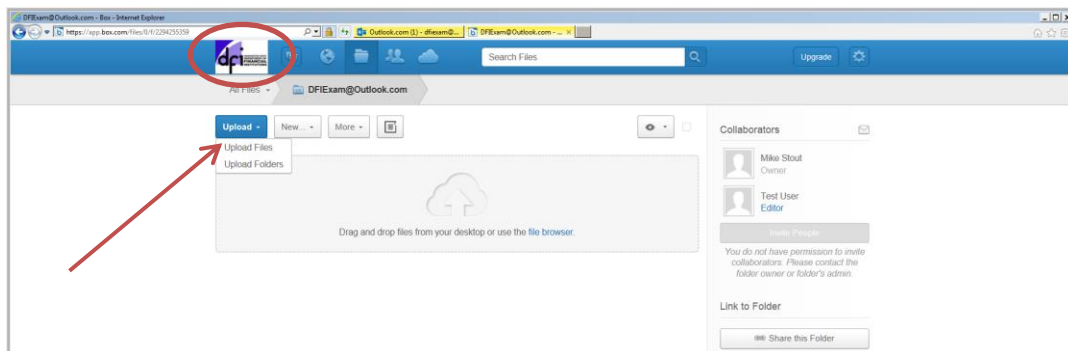


4. Upload Your Zipped and Encrypted Files:

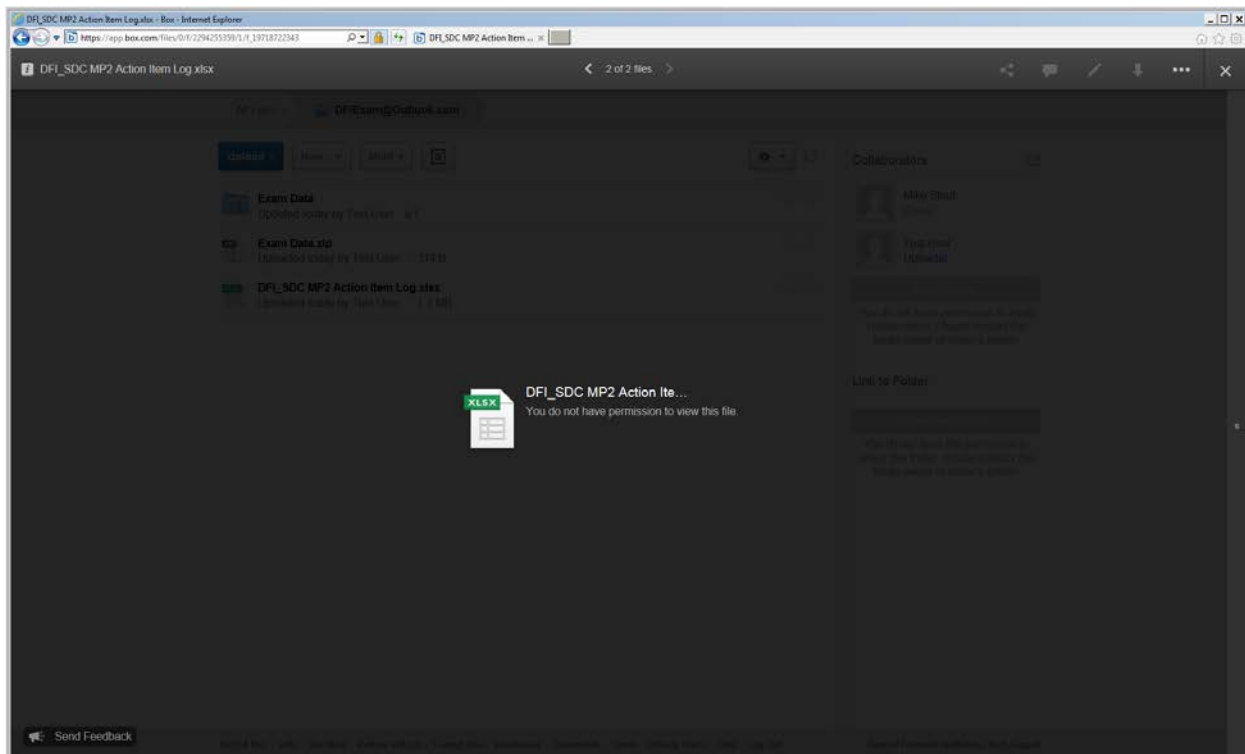
Please ensure that you see the purple DFI logo, circled below, indicating that you are uploading to DFI's secure folder.

Note: If this is your first time using Box.com, please upload a test file and call your DFI representative to verify the upload.

Complete your upload to the DFI folder on Box.com by clicking the blue "Upload" button and select "Upload Files". Then browse to the zipped and encrypted file(s) to upload and press "Open".



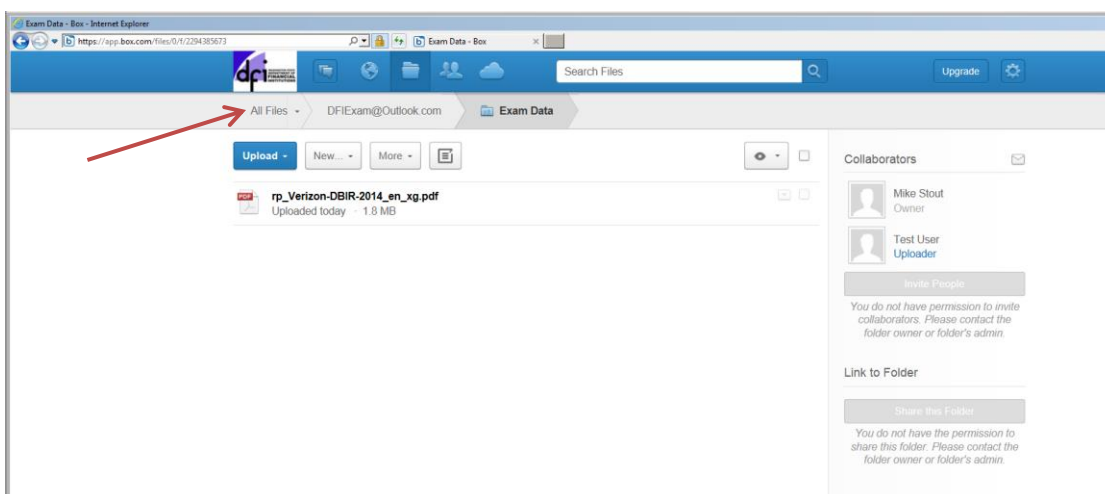
When the upload is complete, you will see your file(s) listed in the secure DFI folder. These file(s) can only be accessed by an authorized DFI employee. Employees of the financial institution cannot access the files as shown by the screen below.



5. Share your WinZip Password with your DFI representative.

After uploading your files, phone your DFI Representative to share your WinZip encryption password. For security purposes, please do not e-mail this WinZip encryption password to your DFI Representative.

To navigate back to your personal folder click “All Files”.



The following information is provided to assist you with using your Box.com account. If you have other questions, please contact your DFI representative or the DFI helpdesk at 360-725-9692.

Help

Box.com [Video Library](#)

Box.com [Help Documents](#)

Password Requirements

Please create a complex password which contains at least 8 characters, including:

- At least one Number
- At least one Special Character
- Upper and / or Lowercase Letters.

The password reset interval is 90 Days.

A few password examples are: 14TheMoney! , (2fodaSho), &Tree2GetReady – do not use these examples!